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Visionlink Community Services & Referrals

Visionlink.org
303.402.0170
Boulder, CO

Community Services & Referrals

This is the most advanced resource directory solution in the market—our objective is to ensure that you can be the coordination hub for the resources useful to your clients and to your partner agencies.

The future is about exchanging your valuable resource directory information with literally dozens of other organizations, being the hub of service information for your clients and partners.

At the same time, the needs of those seeking help are more complex, so the professionals using these tools need advanced, quick, and easy to use tools that let them focus on the people they serve.

Core Directory Design

This core module builds on a four-tier hierarchy of Agencies, Programs, Services and Sites.

This matches the real-world where "agencies organize programs that offer services at different sites." (The Program level is optional.)

Our profiles for each of these levels are designed by AIRS[1] certified domain experts. Advanced users can adjust these profiles to meet their needs.

One Solution: Leveraged

We deploy this core module differently for different purposes.

For our disaster relief customers, the resource directory is streamlined—focused on critically useful information and rapid updates.

For 2-1-1 and aging agencies, it includes a wealth of details for comprehensive resource management.

For specialized programs, such as for Addiction Recovery or the CARES Act, resources are streamlined for targeted populations.

For coordinated care networks you can manage an entire network of referrals, service provision, follow-ups and more.

One Directory: Many Uses

The profiles of agencies, services and so forth can be configured to support the specific tasks of resource managers, to present simplified information to the public, and with restricted details (e.g., about a domestic violence shelter), only for contact specialists.

This is done by deploying differently configured forms and permissions for different stakeholders—and yet all of it builds on the same integrated resource

[1] Alliance of Information and Referral Systems. See www.airs.org.

directory system so you only have one directory to manage.

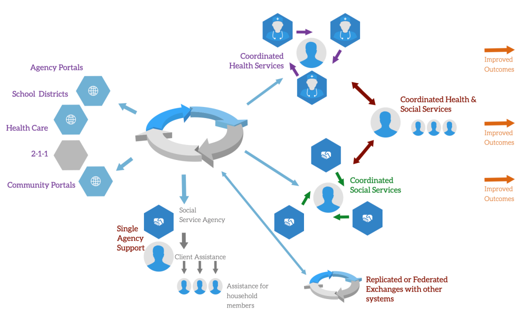
Unlike Any Other

No other software solution allows you the flexibility to create uniquely configured profiles for Resource Managers, the public, contact specialists, stakeholders, partners and programs, and to define the content and workflow to match their work.

Imagine different agencies, doing different work—all on one cost saving coordinated platform.

The Core of Coordinated Care

The Visionlink resource directory is built from the ground up for coordinated care. Ask for our Referral Options and Coordinated Care documents to learn more.

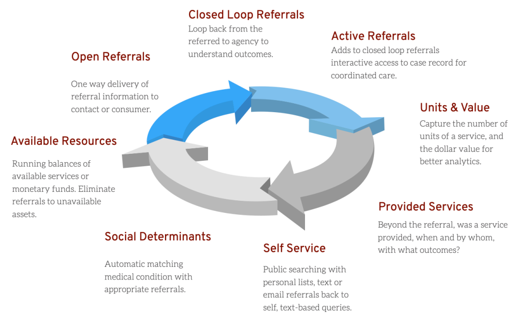


Referral Options

We offer more referral options than any other…and the tools continue to expand to meet specific needs of different kinds of partnerships.

Nearly a dozen kinds of referral options can be activated depending on your needs:

- Client Self-Referral
- Call Center Referral
- Partner Agency Referral
- Open Loop Referral
- Closed Loop Referral
- Active Referrals
- Units & Value Tracking
- Provided Services Tracking
- Social Determinants Mapping
- Available Funds
- Available Assets
- Care Team Referrals



Plus, you can manage out of directory referrals, met and unmet needs, and more.

With all of these, enjoy a streamlined solution so that you can search for, select, and make referrals in just a few clicks.

Once made, you can review the referrals and indicate any unmet needs. The met and unmet referrals are automatically linked to the proper taxonomy codes for reporting.

A special window pops up to provide key information quickly, or you can click into the full record if this is a resource about which you are less familiar.

Messaging Options

With these different options we also support text and emails back to the client for self referrals, or from your contact specialists or other staff.

You can message agencies about referrals made to them or have them indicate whether or not service was provided or include them in coordinated care teams.

You can make as many referrals as you need, see past referrals by interaction, or as a full set of historical referrals.

You can also set follow up dates and make referrals to resources not in your directory.

Taxonomy Management

We support the AIRS taxonomy, and your own edits to that taxonomy.

We also offer the ability to create your own simple or complex set of categories from scratch (for Advanced and Enterprise platform users.)

Disaster responders may want to use a highly streamlined version of the taxonomy, or the filtered taxonomy for disasters configured by AIRS.

See Also's, Use references, active and inactive categories, approved and unapproved categories, AIRS definitions and more are all included.

Use facets and/or key terms, tag items for visibility in specific programs. Use the Complexity Report to analyze the structure of your data and the time and cost to maintain it (so you can validate your value to funders!)

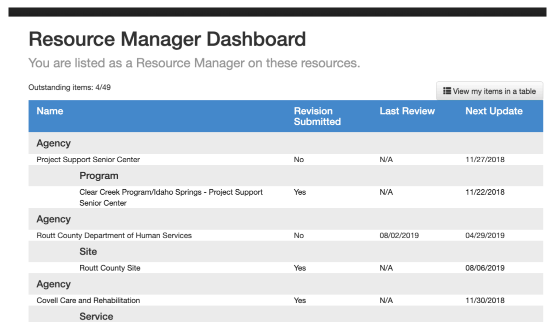
Resource updates

We changed the paradigm.

Past solutions were focused on single and batch update messages to agencies listed in your directory. This fails at scale—too many emails or texts that feel like spam, and these fractured requests did not seem professional to your agency partners—and they take too much time to manage.

Instead we built new and dynamic resource update manager dashboards; two kinds actually—one for your resource managers and one for the agencies listed in your database. (They each get their own personalized dashboard.)

These dashboards show all the profiles due for updates for an agency, and all the profiles being managed by your resource managers in a single view (with table and list views—your choice.)



Resource Manager Dashboard

You are listed as a Resource Manager on these resources.

Outstanding items: 4/49

View my items in a table

Name	Revision Submitted	Last Review	Next Update
Agency			
Project Support Senior Center	No	N/A	11/27/2018
Program			
Clear Creek Program/Idaho Springs - Project Support Senior Center	Yes	N/A	11/22/2018
Agency			
Routt County Department of Human Services	No	08/02/2019	04/29/2019
Site			
Routt County Site	Yes	N/A	08/06/2019
Agency			
Covell Care and Rehabilitation	Yes	N/A	11/30/2018
Service			

These dashboards also manage public updates, manual updates, and automatic updates all in one place.

Agencies can review all their due profiles, confirm that a profile is still current, enter updates, and check on the status of their profiles.

Resource managers can review the edits, accept or edit the changes, and then approve them for release.

And—because you can configure forms for different purposes, you can control what fields agencies can update, or perhaps only view. (Our staff needs to connect your desired form with the automatic update module for you.)

Your resource specialists can also see the dates of the entered revisions and keep notes about contacts, preferences and more.

These resource updates are delivered by tokenized emails to your agency contacts, so agency staff do not need accounts, so there is no charge for user accounts, and the solution is much more secure than texted links.

The system is also designed for massive scale, so that entire communities or states could be asked for updates at the same time—during a disaster for example, with auto-queuing messaging and delivery monitoring.

Quick Data Entry

The resource directory uses a wide variety of tools to make data entry and management quick and easy.

Type ahead data fields, address verifications, data formatting, even default values and initial values are included, and yes, default and initial can be different to make data entry efficient.

Other examples would include: 'required after first entry' for sophisticated workflows; and, how the "post services field" learns the most frequent searches for each resource manager, to save time.

Resource profiles offer more than 20 fields types (with another 20 for Visionlink use), helping to ensure data quality—no longer do you need to force a field to do what is it not designed to do.

AIRS Tools

Linked terms are created using AIRS standards and ensuring that the Link Term structure is correct. When creating a Linked Term, you can choose the Service Term, Modality, and/or Target Term from dropdown menus. This design ensures you are following the AIRS structure of a Linked Term.

Posting services is another example: on the service profile itself, use a type ahead field to find appropriate taxonomy categories, select one or more as you need. And if the service is already posted to a category—it shows on the profile clearly, and it can be removed with a click (by authorized users.). These are examples of simple and direct time savers.

Our Guided Search option provides a great way to structure your services for the public. It too, can be deployed multiple times—for example, with a focus on aging, or addition recovery, or youth services. It can be deployed on sites that are not your own—such as on the local library site, Chamber of Commerce, or school district sites.

Batch Functions

Using special Excel templates (auto generated by CommunityOS), authorized users can batch update a few or all existing records, enter new records or data, or delete data quickly across a few or tens of thousands of records simultaneously.

These are particularly handy when you need to update a phone number on many profiles or change the format of a field(s) or create a number of similar records.

You can do this with records from one agency or many agencies at the same time.

Data Exchange

The Community Service & Referrals module is designed from the ground up for integrations and data exchange. (You may want to read our documents on Integrations and Data Exchange.)

The data is structured for use in both csv and API data exchanges.

It can be provided to other agencies in bulk or on demand.

It can be updated from other external sources.

It can be shared with health systems for social determinants initiatives.

It can be shared with the UWW National 211 Repository.

It can be a part of API endpoints you configure yourself with our API Builder so that you can, in fact, be the information hub for your entire region.

Data Architecture

Data exchange requires specific data structures, and—contrary to some of our competitor's structures—specific data must be located on separate database records or data exchange efforts will fail. Why? Because the API queries will be unable to collect appropriate information.

If your data is not well formed, we can explain why, and help you move your data into an exchange-ready format. This way, you will be ready to pursue important opportunities.

Want to learn more about data structures, check this out:

https://support.communityos.org/vl-video

Data Duplication Controls

Because Visionlink's platform is designed for data exchange, we need to stop duplication on entry.

Why? Because our systems are moving more than a billion pieces of data every month between systems. If some of your data is duplicated it is most likely going to be part of an exchange before it can be reviewed and corrected after the fact. Then it is too late.

So, we use several tools, from search before entry controls, to location anti-duplication monitors to show to the user if a record is a duplicate.

But, if somehow a record is duplicated, then our bulk update process can be used to combine, edit, and delete duplicates as needed.

Compliance with Taxonomy Rules

The Taxonomy Outline tool allows you to set Taxonomy Codes to Inactive (active is the default) and Unapproved (approved is the default). Both of these are then configurable on a per form basis allowing you to change the view.

For example, you may want Resource Managers to view which Taxonomy categories are approved or unapproved, but Contact Specialists only see approved terms. This allows you to create rules such as, "Services cannot be posted to Taxonomy levels lower than the 4^{th} level," by making the lower levels unapproved.

The Taxonomy Report can show you several insights, including which Services are not posted to a Taxonomy, as an example, so that it can be corrected.

Mobile Responsive

The entire solution – from public to staff views, from admin tools to simple search screens works on smartphones and tablets.

And importantly, because we use the world's leading mobile responsive framework as our user interface, your system will remain up to date with mobile standards. Nothing worse than a mobile solution that no longer works after an upgrade or a change in browsers.

Browser Neutral

All of this is browser neutral. We support current versions of all major browsers and recommend Chrome and Firefox for their adherence to Web and mobile standards.

We support saved entries, spellcheck, and multi-lingual data entry supported by these leading browsers.

Multi-Lingual Options

Your resource profiles can be deployed from forms that present in one or many languages.

We have a special tool that places the fields in a sheet, translations are entered, and then re-imported, and the CommunityOS platform automatically builds the forms and tools in that language(s) for you.

What is special about this approach is that is a database-oriented approach. The benefit is that if a term is re-translated or updated, for example, then every use of that in any form will be updated as well.

Public Options

We have a whole document on this if you want to keep reading... But know that your resource directory can be deployed privately or made available to the public.

Simple search forms can be deployed, or advanced forms with many details, or we can deploy the well received Guided Search system on your web site—or on any partner web site as well.

Reporting Tools

We offer a wide range of on-system, built-in, and partner-based reporting solutions.

Our new ResultsOS solution offers on-platform, real-time reporting with no export or API connections, and our partnership with Domo offers tremendously lower prices for what is arguably the best business intelligence solution in the marketplace.

Please see our ResultsOS and our Domo Reporting documents for details.

Adapt Now & Tomorrow

While we deploy pre-built and expertly crafted solutions, every field, tab, form, role and permission, page and menu, search and search result, csv export and API endpoint—and much more, can be configured by you and you staff, or by asking for assistance from our staff.

The point is to provide a solution that works well right now, but which can adapt to new opportunities as they arise, and to changing contracts and regulations as they impact your work.

Future proof is what we build for.

Part of a Suite of Solutions

This Community Services & Referral core module is part of a suite of ready solutions from Visionlink:

Client & Case Manager
Volunteer Coordination
Goods & Services Donations
Shelter System Management
Repair & Construction Manager
Application & Assistance Manager
Grants Management (forthcoming)
HMIS Management (forthcoming)
COVID Tracking
CARES Act Assistance Manager

These can be combined in ways useful to your operations, your organization, and indeed to your network of collaborative partners.

Or you can build new solutions completely from scratch.

Have a new opportunity? *Your Visionlink platform can already do that.*

For More Information

Feel free to contact us so we can discuss what will work best for you. We'd love to hear from you.

Email contact@visionlink.org
Web www.visionlink.org
Phone 877-VSN-Link (877-876-5465)

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